HOW TO ATTRACT SOCIAL CASINO GAMERS

INSIGHTS INTO THIS VALUABLE MARKET

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ABOUT NEWZOO'S SOCIAL CASINO RESEARCH

FRANCHISES, COUNTRIES & DATA

Newzoo's Social Casino Research allows you to track the demographics, preferences, playing behavior, spending habits, franchise funnel (from awareness to played to favorite aspects), and more of social casino gamers*. Additionally, it allows our subscribers to cross-analyze these players using > 200 variables.

*Gamers that have played social casino games on either a mobile device or casual/social website in the past 6 months

COUNTRY SCOPE

US   UK   AUS

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TRACKING 77 FRANCHISES

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HOW BIG IS YOUR OPPORTUNITY?

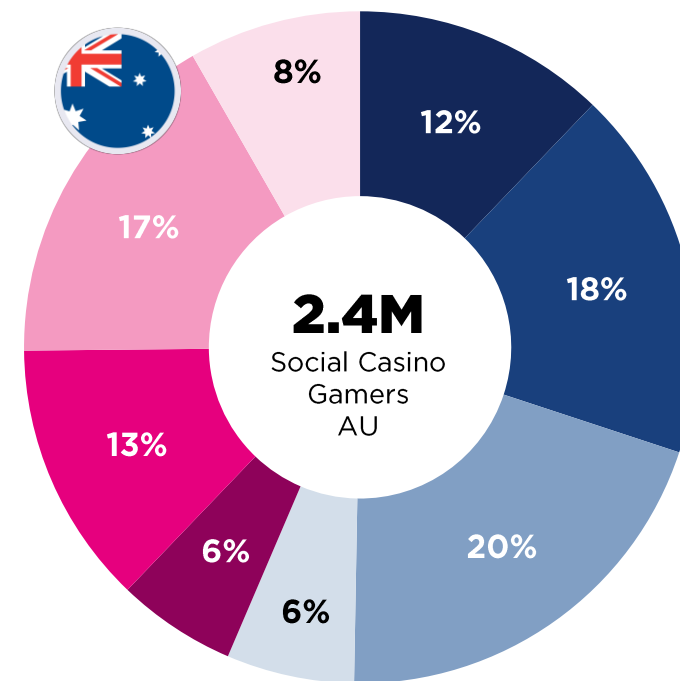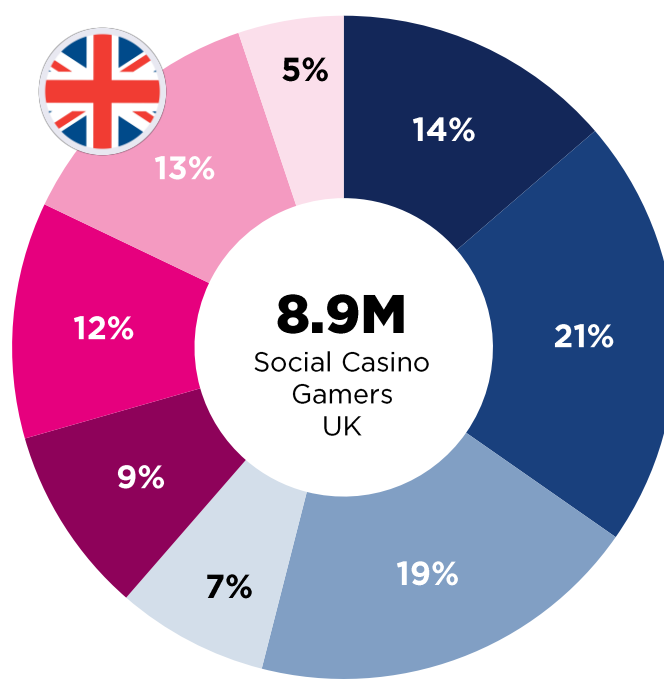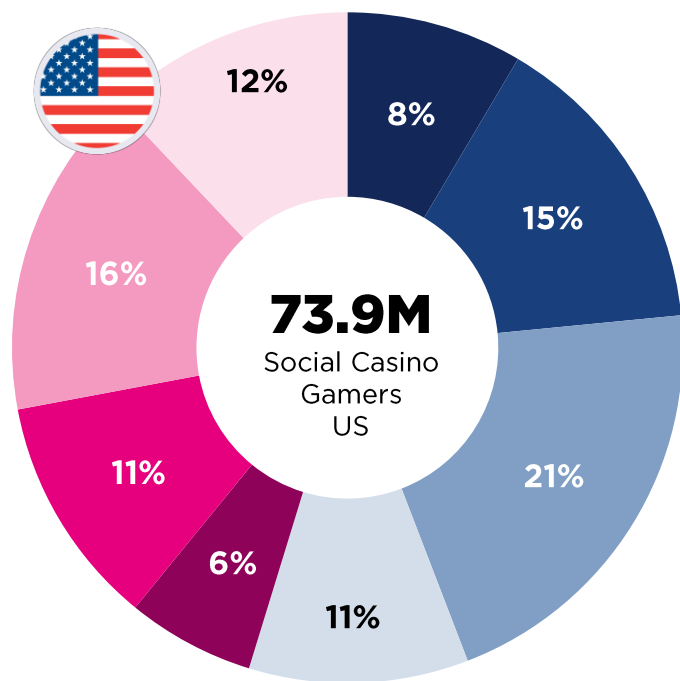OVERVIEW OF SOCIAL CASINO GAMERS | PER COUNTRY

52% payers   **2.6%** of payers are big spenders

64% payers   **3.0%** of payers are big spenders

43% payers   **3.4%** of payers are big spenders

US
73.9M Social Casino Gamers US

- 8%
- 15%
- 21%
- 11%
- 6%
- 11%
- 16%
- 12%

UK
8.9M Social Casino Gamers UK

- 14%
- 21%
- 19%
- 7%
- 9%
- 12%
- 13%
- 5%

AU
2.4M Social Casino Gamers AU

- 12%
- 18%
- 20%
- 6%
- 6%
- 13%
- 17%
- 8%

Legend:
- M 18-25
- M 26-35
- M 36-50
- M 51-70
- F 18-25
- F 26-35
- F 36-50
- F 51-70

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HOW TO ATTRACT THE RIGHT GAMERS

4 KEY INSIGHTS

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PROFILE YOUR TARGET AUDIENCE

MINOR SPENDERS VS. AVERAGE AND BIG SPENDERS | US
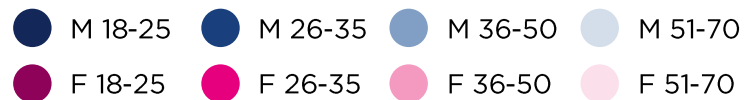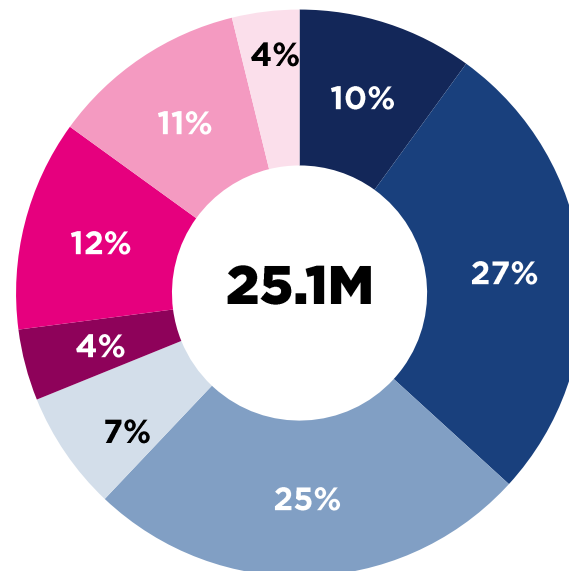
MINOR SPENDERS
AGE/GENDER

13.4M

- 15% — M 18-25
- 19% — M 26-35
- 19% — M 36-50
- 5% — M 51-70
- 10% — F 18-25
- 16% — F 26-35
- 13% — F 36-50
- 3% — F 51-70

AVERAGE AND BIG SPENDERS
AGE/GENDER

25.1M

- 10% — M 18-25
- 27% — M 26-35
- 25% — M 36-50
- 7% — M 51-70
- 4% — F 18-25
- 12% — F 26-35
- 11% — F 36-50
- 4% — F 51-70

Legend
- M 18-25
- M 26-35
- M 36-50
- M 51-70
- F 18-25
- F 26-35
- F 36-50
- F 51-70

59%
of American average and big spenders who play GSN Casino are male

GSN CASINO

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UNDERSTAND THEIR GAME PREFERENCES
FAVORITE TYPE OF SOCIAL CASINO GAME | COUNTRY COMPARISON

● United States ● United Kingdom

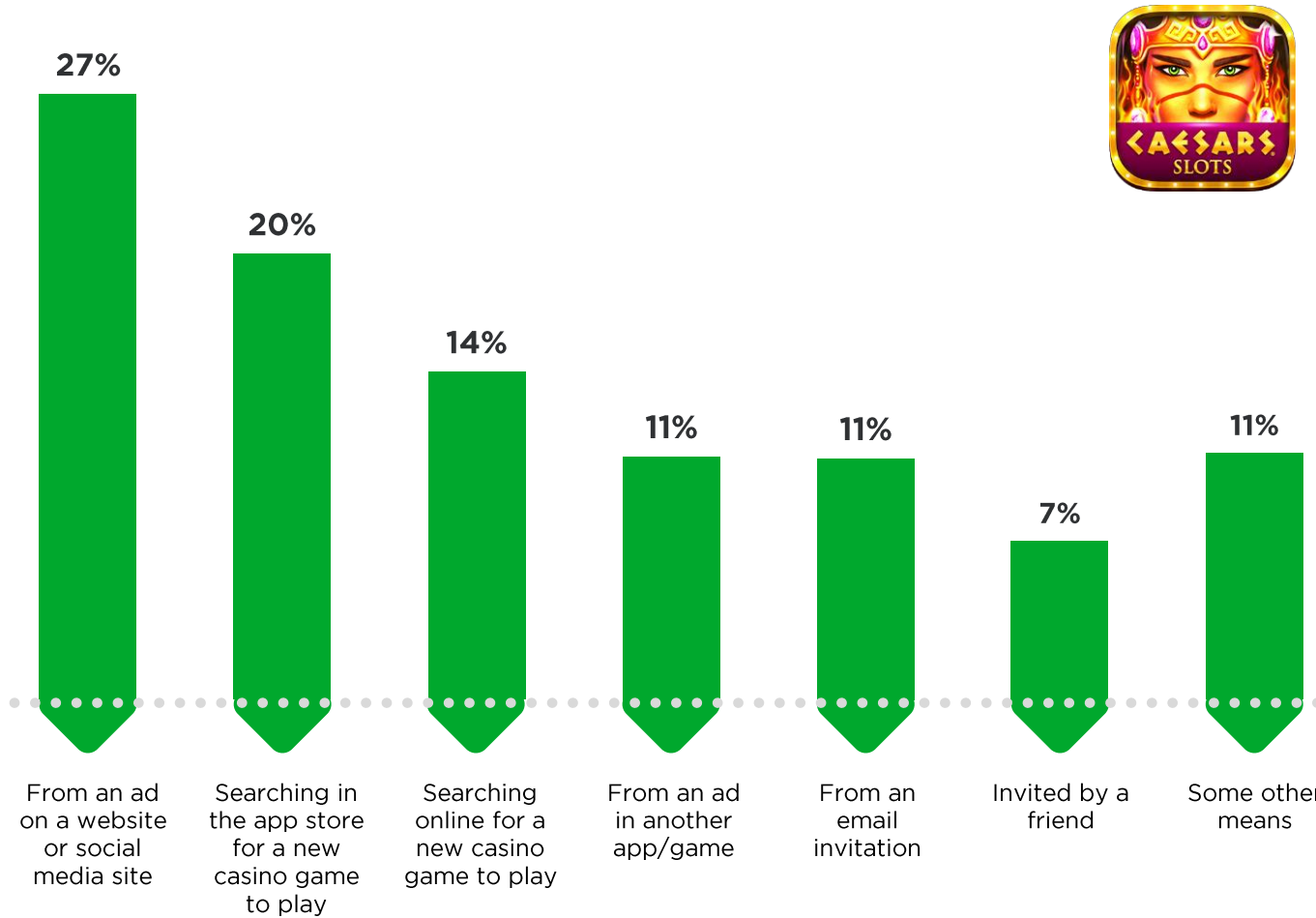|	Poker	Slots	Bingo	Blackjack	Roulette	Video Poker	Other
United States	27%	26%	17%	15%	5%	6%	4%
United Kingdom	24%	20%	23%	11%	14%	4%	4%
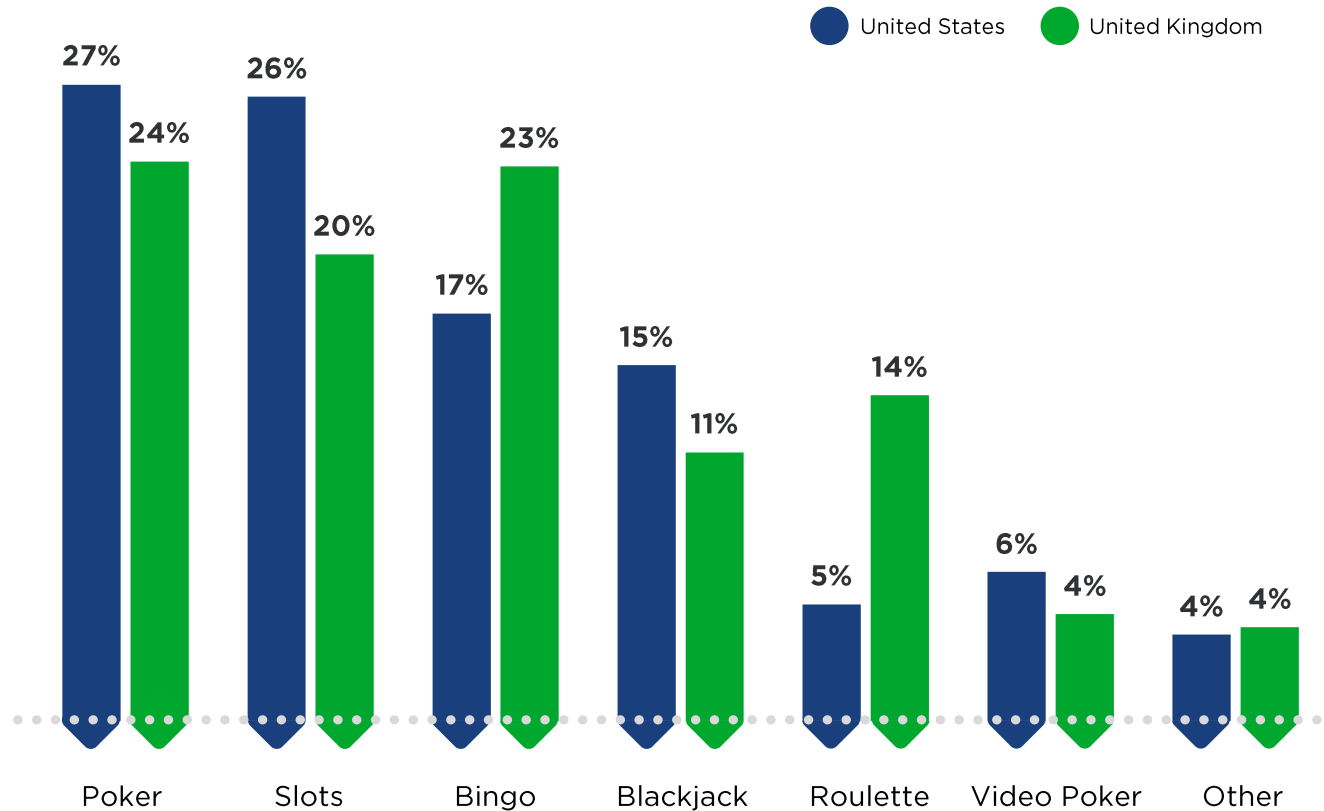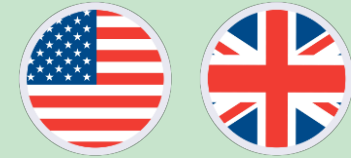
25%
of American social casino gamers prefer **branded/pop-culture** themed slot games while

22%
of British social casino gamers prefer **traditional** themed slots games

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KNOW HOW THEY DISCOVER GAMES

SOURCE OF GAME DISCOVERY – CAESARS SLOTS | AU

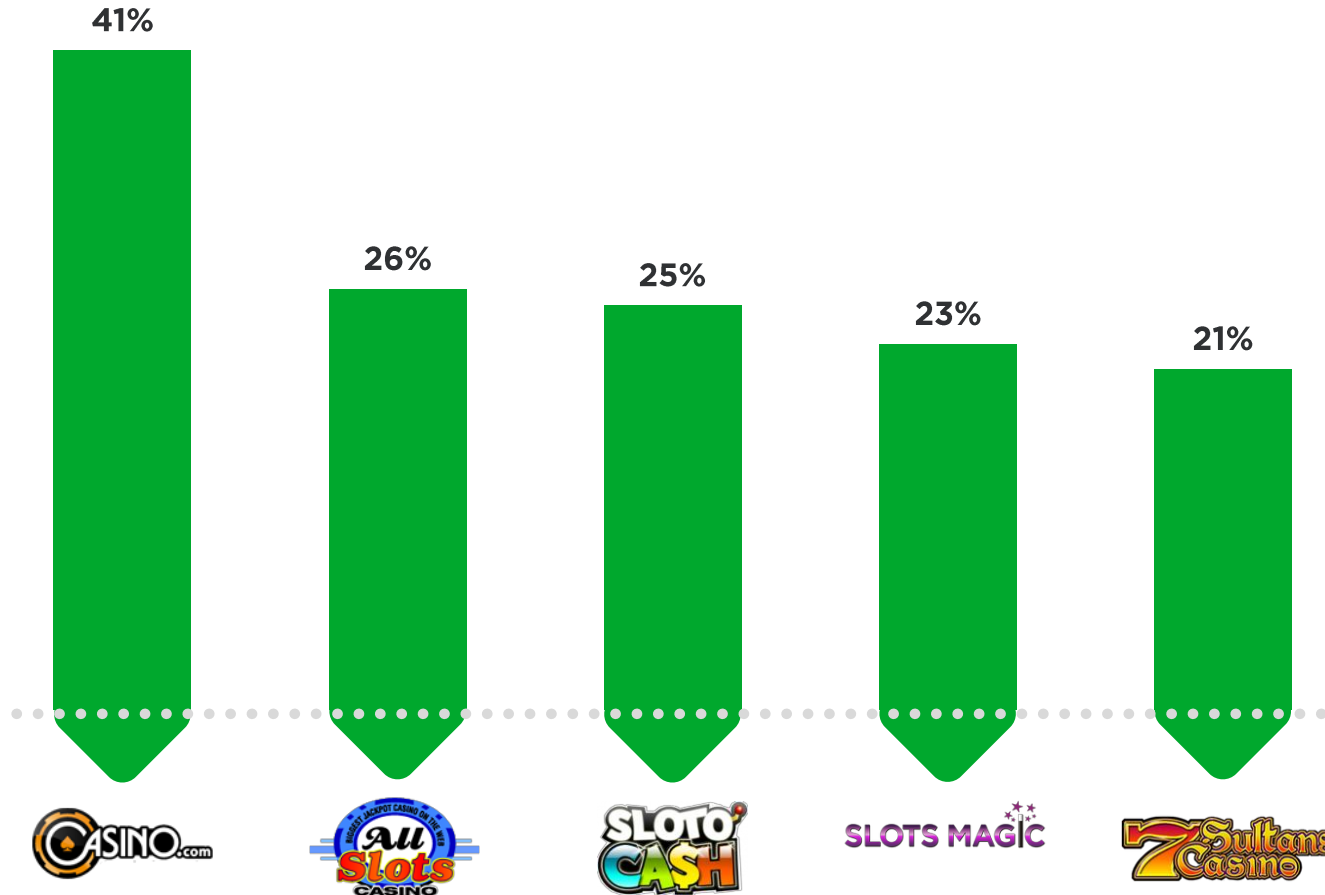| 27%	20%	14%	11%	11%	7%	11%
From an ad on a website or social media site	Searching in the app store for a new casino game to play	Searching online for a new casino game to play	From an ad in another app/game	From an email invitation	Invited by a friend	Some other means

22%

of Gold Fish Casino Slots gamers first started playing the game while searching online for a new casino game to play

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ADVERTISE IN THE RIGHT PLACE

MOST POPULAR ONLINE CASINO WEBSITES* | AU

41%
26%
25%
23%
21%

Casino.com · All Slots Casino · SLOTO CASH · SLOTS MAGIC · 7 Sultans Casino

41%

of myVegas Slotsgamers in Australia who visit online casino websites visit SlotoCash Casino

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*Among gamers who gamble for real money at online casinos

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ABOUT NEWZOO'S SOCIAL CASINO RESEARCH

WHAT'S INCLUDED?

ONLINE DATA DASHBOARD & DATASETS
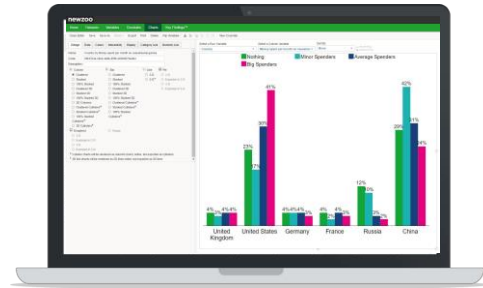
EXPORT TO:

ANALYSIS SUPPORT

LIZA GROENEVELD
VP Client Relations

EMILY SOUZA
Client Director

SANDER BOSMAN
VP Research

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TOPICS INCLUDED

Zooming in on gamers that play 1) Social casino, 2) Real money skill games, 3) Bingo and 4) Real money gambling:

›   **Popularity of social casino game franchises:** awareness and play experience, franchise-specific topics (evaluation, time played, reason to start playing, device(s) played on, favorite aspects by franchise), overlap in franchises played, and for which franchises players pay and why they spend on one and not on another.

›   **Socio-demographics:** age, gender, income, education, hobbies, main mobile brand.

›   **Media behavior:** time spent on media, favorite music, most watched TV & movie genres, esports awareness & viewership, app store used.

›   **Spending Behavior:** play for money at online and physical casinos, casino websites visited, betting or wagering in relation to horseracing, sports & esports, payers vs. non-payers of casino games, level of spending, reason not to spend money

›   **(Social) casino game specific topics:** most important factors when searching for social casino games, preferred themes.

UP NEXT: LOOK OUT FOR OUR NEXT REPORT ON HOW TO RETAIN THESE GAMERS AND COMPETE IN THE SOCIAL CASINO SPACE

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ABOUT NEWZOO

Newzoo is a global leader in games, esports, and mobile intelligence. We provide our clients with a mix of market trends, financial analysis, revenue projections, consumer insights, data modelling solutions, and predictive analytics services across all continents, screens, and business models. We are proud to work for the majority of top game and esports companies along with many independent game developers and leading global technology, internet, and media companies.

SAN FRANCISCO

AMSTERDAM

SHANGHAI

OVER 100 SUBSCRIBERS, INCLUDING

| GAMES | MEDIA | HARDWARE | BRANDS | ESPORTS |

FOCUS ON GAMES, ESPORTS & MOBILE INTELLIGENCE